



USDA TURKEY MARKET NEWS REPORT

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U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The market tone on frozen 8-16 lb. hens and 16-24 lb. toms was steady. Offerings were adequate however buyers were slow to commit. Trading centered in the Central region on a light volume of hens for current shipments, and 65 loads of hens and 35 loads of toms for May-September shipments. No whole bird trading in the East or West. Bulk meat trading was heavy on frozen boneless/skinless breast meat, otherwise trading was slow to fair on bulk meats and parts.



EXPORT MARKET HIGHLIGHTS

A fair volume thigh meat moved into export channels. Otherwise trading centered on spot loads. For export: young hen necks 13 cents, drummettes 13, young hen drums 16, fresh thigh meat 54-55 delivered.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **FEBRUARY 27, 2003**

| | CURRENT SHIPMENTS 2/ | | | | FORWARD SHIPMENTS 6/ | | | OPEN COMMITMENTS 7/ | |
|-------------------|----------------------|-------|---------|--------------|----------------------|--------------|----------|---------------------|----------|
| | OFFERS | SALES | WTD AVG | VOLUME (000) | WTD AVG | VOLUME (000) | DEL. PER | VOLUME (000) | DEL. PER |
| 8-16 LB HENS | | | | | | | | | |
| EASTERN REGION 3/ | 61-62 | - | - | - | - | - | - | - | - |
| CENTRAL REGION 4/ | 59-62 | 59-62 | 59.83 | 36 | - | - | - | - | - |
| WESTERN REGION 5/ | 61-62 | - | - | - | - | - | - | - | - |
| 16-24 LB TOMS | | | | | | | | | |
| EASTERN REGION 3/ | 59 | - | - | - | - | - | - | - | - |
| CENTRAL REGION 4/ | 58-59 | 58 | 58.00 | 40 | - | - | - | - | - |
| WESTERN REGION 5/ | 57-59 | - | - | - | - | - | - | - | - |

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **FEBRUARY 28, 2003**

| | CURRENT SHIPMENTS 2/ | | | | FORWARD SHIPMENTS 6/ | | | OPEN COMMITMENTS 7/ | |
|-------------------|----------------------|-------|---------|--------------|----------------------|--------------|----------|---------------------|----------|
| | OFFERS | SALES | WTD AVG | VOLUME (000) | WTD AVG | VOLUME (000) | DEL. PER | VOLUME (000) | DEL. PER |
| 8-16 LB HENS | | | | | | | | | |
| EASTERN REGION 3/ | 61-62 | - | - | - | - | - | - | - | - |
| CENTRAL REGION 4/ | 60-62 | 60 | 60.00 | 120 | - | - | - | 2600 | MAY-SEP |
| WESTERN REGION 5/ | 61-62 | - | - | - | - | - | - | - | - |
| 16-24 LB TOMS | | | | | | | | | |
| EASTERN REGION 3/ | 59 | - | - | - | - | - | - | - | - |
| CENTRAL REGION 4/ | 58-59 | - | - | - | - | - | - | 1400 | MAY-SEP |
| WESTERN REGION 5/ | 58-59 | - | - | - | - | - | - | - | - |

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

| WEEK OF FEB 28, 2003 | CURRENT WEEK | LAST WEEK | SAME WEEK YEAR AGO | MONTH OF FEBRUARY | CURRENT MONTH | LAST MONTH | SAME MONTH YEAR AGO |
|----------------------|--------------|-----------|--------------------|-------------------|---------------|------------|---------------------|
| 8-16 LB HENS | | | | 8-16 LB HENS | | | |
| EASTERN REGION | 61.50 ** | 61.00 ** | 59.20 ** | EASTERN REGION | 61.13 | 61.04 | 60.03 |
| CENTRAL REGION | 60.31 | 60.00 ** | 57.50 | CENTRAL REGION | 60.21 | 60.63 | 59.15 |
| WESTERN REGION | 61.50 ** | 60.50 ** | 60.00 ** | WESTERN REGION | 60.76 | 60.55 | 60.26 |
| 16-24 LB TOMS | | | | 16-24 LB TOMS | | | |
| EASTERN REGION | 59.00 ** | 58.50 ** | 56.10 ** | EASTERN REGION | 58.63 | 58.36 | 56.97 |
| CENTRAL REGION | 58.00 | 57.50 ** | 54.50 | CENTRAL REGION | 57.74 | 57.65 | 56.25 |
| WESTERN REGION | 57.00 | 57.00 ** | 56.20 ** | WESTERN REGION | 57.29 | 57.29 | 57.50 |

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

| | <u>RANGE</u> |
|------------------------------|--------------|
| FRESH TURKEYS Y HENS 8-16# | 96 |
| FRESH TURKEYS Y TOMS 14-24# | 96 |
| FROZEN TURKEYS Y HENS 8-16# | 65-66 |
| FROZEN TURKEYS Y TOMS 14-24# | 63 |
| FROZEN TURKEYS Y TOMS 24-28# | 65-72 |

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

| | <u>RANGE</u> |
|------------------------------|--------------|
| TURKEYS Y HENS | 115-129 |
| TURKEYS Y TOMS UNDER 22# | 115-125 |
| TURKEYS Y TOMS 22-24# | 115-125 |
| TURKEYS Y TOMS 24-26# | 115-129 |
| TURKEYS Y TOMS 26 LBS & OVER | 115-129 |

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 03-MAR-2003

| | (8-16#) | (16-24#) | |
|---------------------------------|--------------|--------------|---------------------------|
| | HENS | LBS TOMS | LBS |
| | <u>PRICE</u> | <u>(000)</u> | <u>PRICE</u> <u>(000)</u> |
| SALES (PROMOTIONS INCLUDED) | 67.48 | 124 | 64.00 20 |
| SALES (PROMOTIONS NOT INCLUDED) | 68.15 | 104 | 64.00 20 |
| SALES (PROMOTIONS ONLY) | 64.00 | 20 | |
| SALES (PRICE TO BE DETERMINED) | | 20 | |

TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS

| | |
|---------------------|----------|
| JANUARY | 444,767* |
| FEBRUARY 1-22, 2003 | 299,857* |
| To date 2003 | 744,624* |
| To date 2002 | 738,242* |

*PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 22-Feb-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

| | | <u>YOUNG TURKEYS</u> | | <u>TOTAL TURKEYS</u> | |
|-----------------|-----------|----------------------|-------|----------------------|-------------|
| | | PCT | AVG | OLD | AVG |
| | | CHG | LIVE | BANDED | LIVE |
| | | PW | WT | | WT |
| -THOUSAND HEAD- | | | | -THOUSAND HEAD- | |
| N EAST | 639 | -9 | 21.53 | (A) | 642 21.53 |
| SATL | 817 | 1 | 30.29 | (A) | 821 30.29 |
| N CENT | 2,173 | 2 | 32.60 | (A) | 2,177 32.6 |
| S CENT | 442 | 0 | 20.96 | (A) | 445 20.96 |
| WEST | 279 | 11 | 23.25 | (A) | 282 23.25 |
| U.S. TOTAL | 4,350(B) | 0 | 28.75 | 17 | 4,367 28.76 |
| TO-DATE | | | | | |
| 2003 | 33,680(B) | | | 96 | 33,776 |
| TO-DATE | | | | | |
| 2002 | 34,710(B) | | | 64 | 34,774 |

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 76,000; for the year 452,000; last year to date 320,000.

LIVE TURKEYS SLAUGHTERED

W/E 22-Feb-2003

| | YOUNG | | YOUNG | OLD | TOTAL |
|----------------|------------------|--------|----------|-------|--------|
| | HENS | TOMS | BREEDERS | | |
| | <u>THOUSANDS</u> | | | | |
| HEAD | 1,668 | 2,606 | 76 | 17 | 4,367 |
| AVG WT | 15.79 | 37.14 | 25.93 | 29.37 | 28.76 |
| LAST WEEK | 1,717 | 2,575 | 52 | 7 | 4,351 |
| SAME WK YR AGO | 1,754 | 2,721 | 56 | 10 | 4,541 |
| AVG WT | 16.42 | 36.08 | 24.85 | 32.56 | 28.33 |
| TO-DATE/2003 | 13,067 | 20,161 | 452 | 96 | 33,776 |
| TO-DATE/2002 | 13,636 | 20,754 | 320 | 64 | 34,774 |

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 27 FEBRUARY 2003.

The trade sentiment on bulk parts was steady to fully steady with drums and necks in the strongest position. Demand was light to fair. Offerings of tom full-cut wings light to adequate with some noting wings out of big toms harder to come by. Offerings on the balance of bulk parts were light to instances adequate. The undertone on thigh meat continued to show signs of increased strength as some buyers continued to note less discounted product being offered into export channels. Demand was slow to moderate with interest noted for Asia, Mexico and Russia. The undertone on mechanically separated turkey was steady and frozen tom breast meat from new production traded at higher price levels for domestic shipments. Trading centered on a moderate volume of frozen thigh meat and on a light volume of tom drums for export, balance slow. Livers 15 (pet foods), breast chopping skin 16, Grade A non-basted breasts: 12-14 lb. 100-102, 14-16 lb. 100, 18-20 lb. 110, 20-22lb. 115, plant grade non-basted breasts: 12-14 lb. 89, 14-16 lb. 89-92 cents delivered domestic. For export: breeder hen wings 12.50, young hen necks 13-15.50, young hen drums 16-16.50, tom hand cut hand defatted gizzards 63 cents delivered.

| DOMESTIC TRADING | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|-----------------------------------|----------------|-------------------|------------------|-----------------|
| BREASTS, 4-8 LBS GRADE A 2/ | 93.00 | | 93.00 | 40 |
| BREASTS, 4-8 LBS GRADE A—FRESH 2/ | 154.00 | | 154.00 | 25 |
| BREASTS, 4-8 LBS PLANT GRADE 2/ | 85.50 | | 85.50 | 40 |
| DRUMSTICKS, TOM | 21.00 | | 21.00 | 20 |
| DRUMSTICKS, TOM—FRESH | | W | 22.50 | 40 |
| DRUMSTICKS, HEN | 17.00 | | 17.00 | 20 |
| WINGS, FULL-CUT, TOM | | W | 15.00 | 20 |
| WINGS, FULL-CUT, HEN | | R | 17.00 | 20 |
| WINGS, V-TYPE, TOM | 22.00 | | 22.00 | 50 |
| WINGS, V-TYPE, HEN | 56.00 | | 56.00 | 20 |
| NECKS, TOM | | T | 18.00 | 40 |
| NECKS, HEN | | T | 19.50 | 18 |
| BREASTS, B/S, TOM 3/ | 110.00-115.00 | | 111.67 | 120 |
| BREASTS, B/S, TOM—FRESH 3/ | 111.00-113.00 | | 112.33 | 120 |
| THIGH MEAT | 49.00-50.00 | | 49.50 | 80 |
| THIGH MEAT—FRESH | 55.00 | | 55.00 | 40 |
| BREAST TRIM MEAT | | | | |
| SCAPULA MEAT | 62.00-63.00 | | 62.33 | 120 |
| TENDERLOINS | | | | |
| DESTRAPPED TENDERS | 102.00 | | 102.00 | 40 |
| DESTRAPPED TENDERS—FRESH | | M | 114.85 | 47 |
| WING MEAT WITH SKIN | | R | 44.50 | 120 |
| MECHANICALLY SEPARATED 4/ | | M | 16.00 | 40 |
| MECHANICALLY SEPARATED—FRESH 4/ | 16.00-17.00 | | 16.67 | 60 |

EXPORT TRADING

| | | | | |
|---------------------------|-------------|---|-------|-----|
| DRUMSTICKS, TOMS | 20.50-21.00 | | 20.70 | 200 |
| WINGS FULL-CUT - TOMS | 16.00 | | 16.00 | 40 |
| WINGS, V-TYPE, TOM | | M | 23.86 | 364 |
| TAILS | 20.00-20.50 | | 20.25 | 80 |
| MECHANICALLY SEPARATED 4/ | 19.00 | | 19.00 | 40 |
| THIGH MEAT - FROZEN | 42.00-51.00 | | 47.51 | 540 |

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 FEBRUARY 2003.

The undertone was steady on fresh tom breast meat and fresh destrapped tenderloins, fully steady on fresh wing meat and scapula. The undertone on frozen tom breast meat and frozen destrapped tenderloins with -3 months age was fully steady and -6 months age was barely steady at best, frozen scapula and wing meat from current production at least steady. The trade sentiment on breast trim was steady to barely steady. White meat demand was slow to moderate. Fresh white meat offerings ranged from light on wing meat and scapula to instances fully adequate on tom breast meat. Frozen white meat offerings were light and generally held with confidence on product with -3 months age, adequate to instances burdensome with +3 months age. Rib breast demand light on 4-8 lb. sizes, fair on institutional sized breasts. Offerings were adequate to fully adequate on 4-8 lb. weights, adequate to instances burdensome on institutional sizes with the larger sizes in the longest position. Domestic trading centered on a moderate volume of -6 months age frozen tom breast meat and exports on a fair volume of frozen thigh meat for export, balance light. Fresh wing meat 46, fresh scapula 62, fresh breast trim 80 cents delivered domestic. For export: young hen necks 13, drumettes 13, young hen drums 16, frozen thigh meat +3 months age 47, fresh thigh meat 54-55 cents delivered.

| DOMESTIC TRADING | PRICE RANGE | LST CDE 1/ | WTD AVG PRICE | VOLUME (000) | WEEKLY WTD AVG PRICE | WEEKLY VOLUME (000) |
|-----------------------------------|---------------|------------|---------------|--------------|----------------------|---------------------|
| BREASTS, 4-8 LBS GRADE A 2/ | | R | 93.00 | 40 | 93.00 | 40 |
| BREASTS, 4-8 LBS GRADE A—FRESH 2/ | | R | 154.00 | 25 | 154.00 | 25 |
| BREASTS, 4-8 LBS PLANT GRADE 2/ | 89.00 | | 89.00 | 40 | 87.83 | 120 |
| DRUMSTICKS, TOM | 21.00-22.00 | | 21.33 | 120 | 21.29 | 140 |
| DRUMSTICKS, TOM—FRESH | | W | 22.50 | 40 | 20.00 | 100 |
| DRUMSTICKS, HEN | | R | 17.00 | 20 | 16.86 | 70 |
| WINGS, FULL-CUT, TOM | 16.00-17.00 | | 16.50 | 160 | 16.51 | 276 |
| WINGS, FULL-CUT, HEN | | | | | | |
| WINGS, V-TYPE, TOM | | R | 22.00 | 50 | 22.00 | 50 |
| WINGS, V-TYPE, HEN | | R | 56.00 | 20 | 54.20 | 100 |
| NECKS, TOM | 19.00-20.00 | | 19.25 | 80 | 17.91 | 264 |
| NECKS, HEN | | T | 19.50 | 18 | 19.50 | 18 |
| BREASTS, B/S, TOM 3/ | 99.00 | | 99.00 | 600 | 100.58 | 960 |
| BREASTS, B/S, TOM—FRESH 3/ | 111.00-113.00 | | 111.80 | 100 | 113.06 | 360 |
| THIGH MEAT | | R | 49.50 | 80 | 49.50 | 80 |
| THIGH MEAT—FRESH | 53.00 | | 53.00 | 102 | 53.52 | 154 |
| BREAST TRIM MEAT | | | | | | |
| SCAPULA MEAT | 62.00-63.00 | | 62.95 | 42 | 62.49 | 162 |
| TENDERLOINS | | | | | | |
| DESTRAPPED TENDERS | 103.00 | | 103.00 | 40 | 99.33 | 360 |
| DESTRAPPED TENDERS—FRESH | 113.00-114.00 | | 113.64 | 11 | 114.62 | 58 |
| WING MEAT WITH SKIN | 43.00-44.00 | | 43.50 | 80 | 43.50 | 80 |
| MECHANICALLY SEPARATED 4/ | 16.00 | | 16.00 | 20 | 16.00 | 60 |
| MECHANICALLY SEPARATED—FRESH 4/ | 17.00 | | 17.00 | 40 | 16.25 | 400 |

EXPORT TRADING

| | | | | | | |
|---------------------------|-------------|---|-------|-----|-------|-------|
| DRUMSTICKS, TOMS | 23.00 | | 23.00 | 80 | 20.19 | 720 |
| WINGS FULL-CUT - TOMS | 23.00 | | 23.00 | 120 | 18.06 | 360 |
| WINGS, V-TYPE, TOM | | M | 23.86 | 364 | 23.86 | 364 |
| TAILS | | R | 20.25 | 80 | 20.38 | 160 |
| MECHANICALLY SEPARATED 4/ | 19.00 | | 19.00 | 40 | 17.93 | 292 |
| THIGH MEAT - FROZEN | 43.00-50.00 | | 46.84 | 396 | 49.87 | 1,356 |

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.